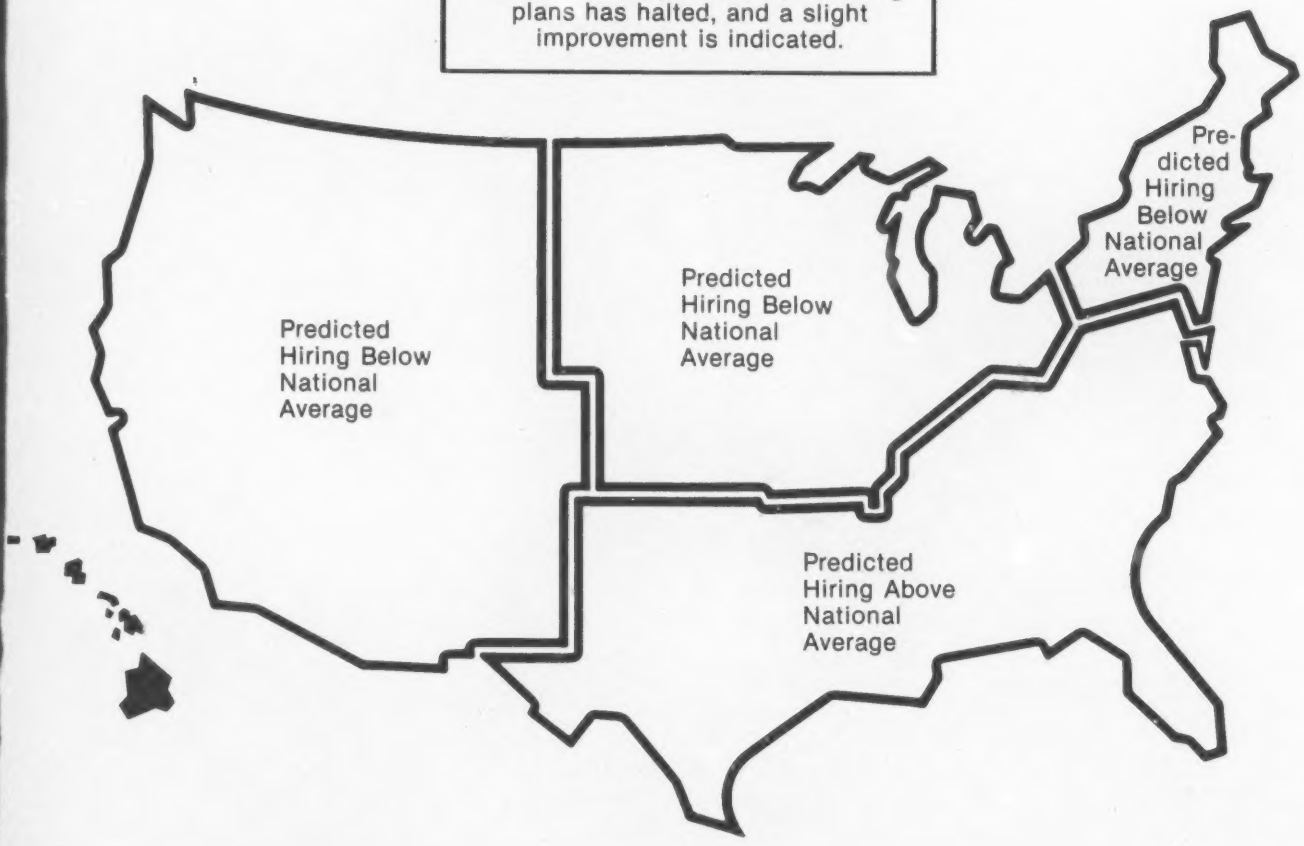
B5275-1 12/22/82

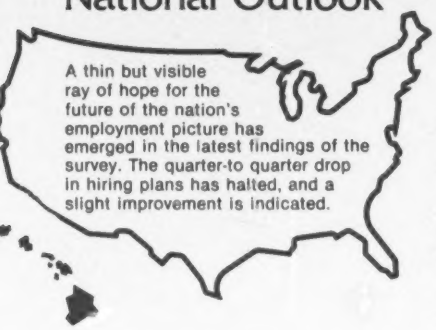
Manpower, Inc. Employment Outlook Survey

First Quarter
January, February, March
1983

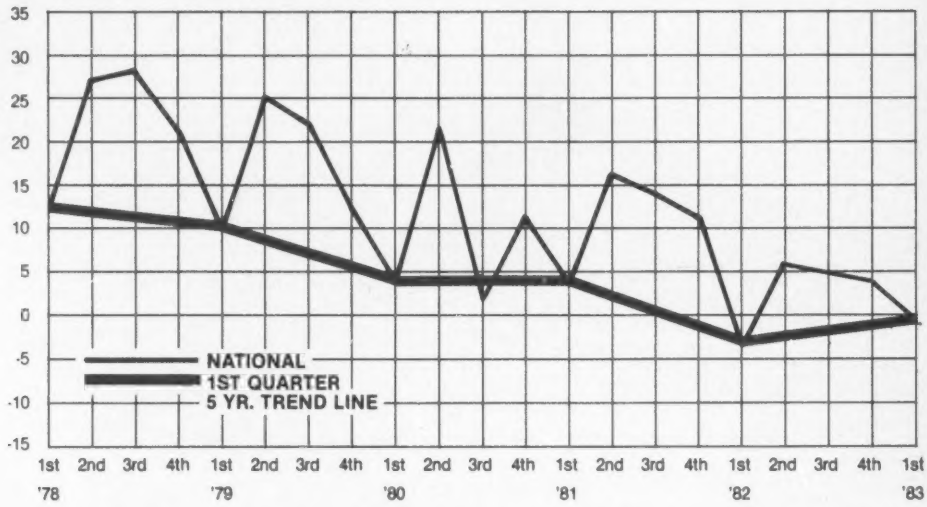
A thin but visible ray of hope for the future of the nation's employment picture has emerged in the latest findings of the survey. The quarter-to-quarter drop in hiring plans has halted, and a slight improvement is indicated.


Predicted Hiring Below National Average
Predicted Hiring Below National Average
Predicted Hiring Below National Average
Predicted Hiring Above National Average

National Outlook


A thin but visible ray of hope for the future of the nation's employment picture has emerged in the latest findings of the survey. The quarter-to quarter drop in hiring plans has halted, and a slight improvement is indicated.

MEASURE OF HIRING EXPECTATIONS*



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

*The Measure of Hiring Expectations is the difference between the percentage of employers predicting staff increases and those planning to decrease hiring activity.

A thin but visible ray of hope for the future of the nation's employment picture has emerged in the latest findings of the quarterly Employment Outlook Survey. According to the projections of over 11,200 employers polled in 347 U.S. cities last month, the quarter-to-quarter drop in hiring plans has halted, and a slight improvement is indicated for the first quarter (January, February, March) of 1983 when compared to survey results of one year ago.

While slightly fewer firms plan to hire additional workers in the next three months than last year at this time, the number expecting cutbacks has declined markedly.

Uncertainty about the length of the recession seems to be holding back plans for increased staffing in the first quarter. There seems to be a trace of cautious optimism in the survey figures for the first time in the last six quarters. It is most evident in the drop in the number of firms expecting workforce reductions. Reductions must decline before positive factors develop. Expected reductions have declined markedly in some key employment sectors, particularly in the construction and manufacturing industries which have been hardest-hit over the past year.

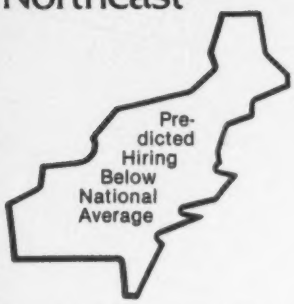
While the number of employers planning to expand their workforce is the lowest seen in six years, the number planning no change is the highest in that same period. It appears that the downward slide which began a year ago has stopped.

Regionally, the South continues to offer the brightest future for jobseekers with a major upswing reported by the construction industry. Western employers continue to expect slightly more cutbacks than increases in staff levels, the Midwest reports a more favorable employment outlook typified by a sharp drop in the number of firms expecting cutbacks, and the Northeast continues to predict slow-paced hiring activity.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	14	68	13	5
Construction	16	55	26	3
Manufacturing—Durable Goods	12	65	19	4
Manufacturing—Non-durable Goods	11	74	11	4
Transportation & Public Utilities	12	69	17	2
Wholesale & Retail Trade	11	65	21	3
Finance, Insurance & Real Estate	18	71	8	3
Education—Public & Private	8	79	11	2
Services	17	70	10	3
Public Administration	11	72	13	4
All Industries	14	68	15	3

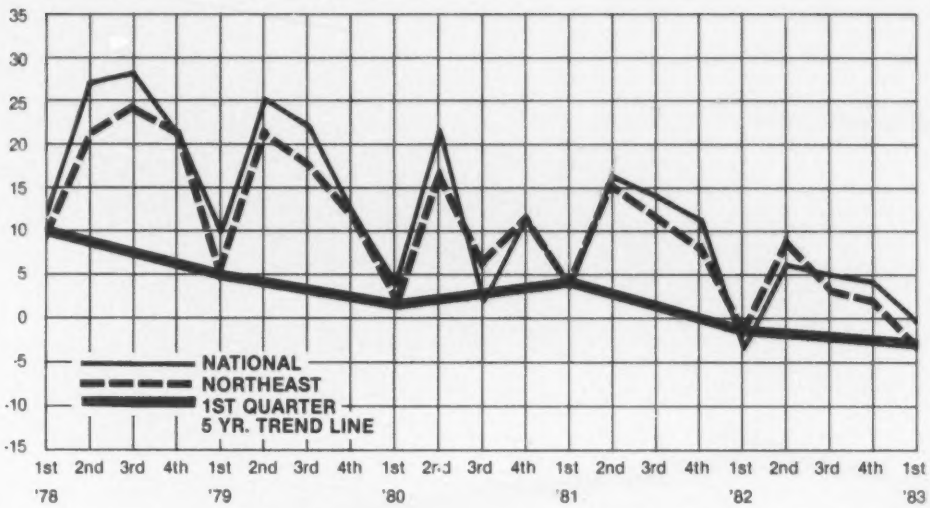
Note: These figures are not adjusted for seasonal variations.

Northeast



Connecticut
Maine
Massachusetts
New Hampshire
New Jersey
New York
Pennsylvania
Rhode Island
Vermont

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

Employers in the Northeast continue to predict slow-paced hiring activity, and some improvement in the construction industry which expects far fewer cutbacks for the first quarter of 1983 than in the past five similar quarters.

Overall, slightly more employers in this region expect staff reductions than plan additions; Northeastern survey figures lag behind those reported nationally.

Manufacturers are cautiously optimistic with the highest number in the seven-year history of the survey planning no change in employment levels. Manufacturers of durable goods predict the job climate to be similar to that of one year ago, and manufacturers of non-durable goods predict a slightly improved employment outlook.

The greatest improvement in job opportunities is reported by the construction industry: the number of expected cutbacks has declined markedly.

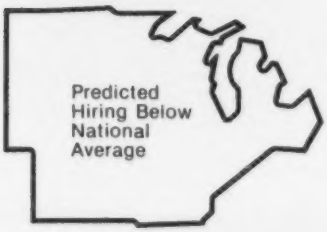
Improvement is also noted by wholesale and retail merchants. Seasonal staff reductions are reported for the first quarter as employers return to pre-holiday staff levels, but the cutbacks are not expected to be as severe as last year.

The employment outlook has stabilized in the white-collar sectors of services and finance, insurance, and real estate. While the number of job opportunities has not increased in these sectors, the number of employers expecting cutbacks in the finance, insurance and real estate sector has slowed.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining*				
Construction	12	57	27	4
Manufacturing—Durable Goods	12	65	18	5
Manufacturing—Non-durable Goods	10	72	11	7
Transportation & Public Utilities	12	68	16	4
Wholesale & Retail Trade	11	65	19	5
Finance, Insurance & Real Estate	15	74	6	5
Education—Public & Private	7	81	6	6
Services	14	70	11	5
Public Administration	5	73	13	9
All Industries	12	68	15	5

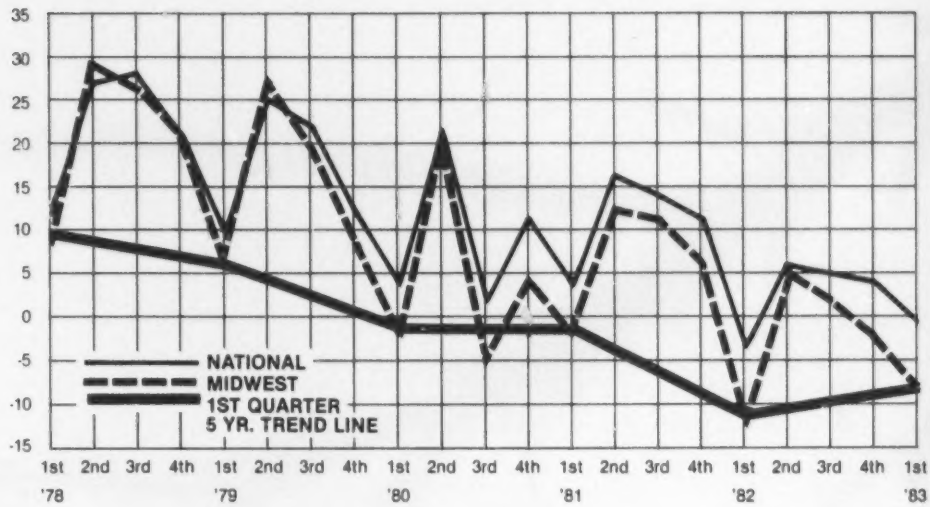
Note: These figures are not adjusted for seasonal variations.
*The size of the mining industry's responding sample does not permit a hiring trend forecast.

Midwest



Illinois	Missouri
Indiana	Nebraska
Iowa	North Dakota
Kansas	Ohio
Michigan	South Dakota
Minnesota	Wisconsin

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

The Midwest reports a more favorable employment outlook than one year ago. The improvement is typified by a drop in the number of firms expecting cutbacks.

This development was particularly evident in the manufacturing sectors with manufacturers of durable goods reporting survey figures which are a great improvement over those of one year ago. While the same number of employers in this sector plans to hire additional workers during the first quarter of 1983, significantly fewer expect reductions. Likewise manufacturers of non-durable goods predict a halt in the quarter-to-quarter cutbacks reported this past year.

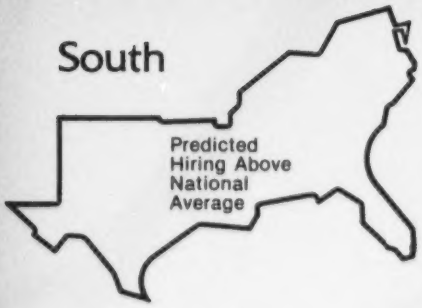
Seasonal cutbacks by wholesale and retail merchants are not expected to be as great as in the past two first quarters and the number of employers actually planning increases has risen slightly.

Construction employers also report a thin but visible ray of hope with fewer expecting workforce cutbacks than last year at this time.

The white-collar sectors of finance, insurance, and real estate and the service industry do not report much improvement. The number of employers planning expansions to staff has diminished slightly, but the number expecting cutbacks has slowed.

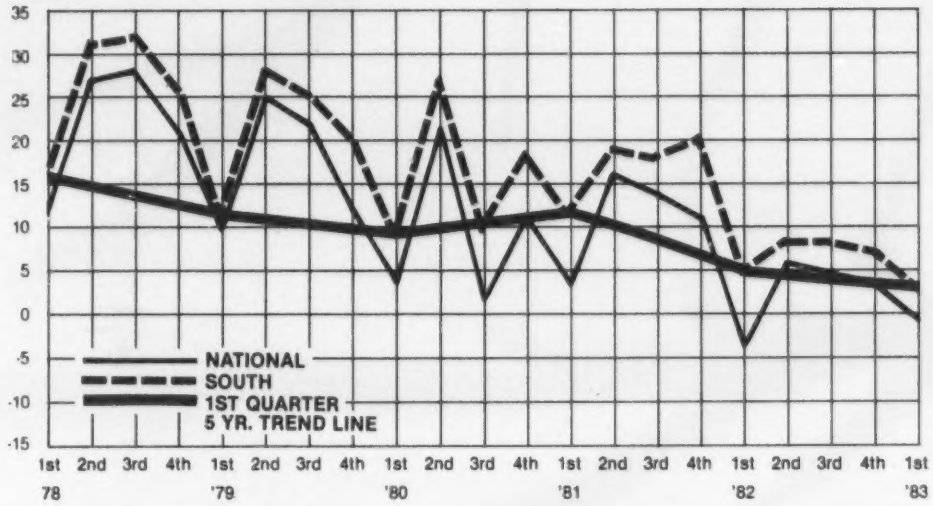
Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining*				
Construction	7	50	42	1
Manufacturing—Durable Goods	11	63	21	5
Manufacturing—Non-durable Goods	10	74	13	3
Transportation & Public Utilities	8	71	20	1
Wholesale & Retail Trade	8	64	26	2
Finance, Insurance & Real Estate	12	78	8	2
Education—Public & Private	7	82	10	1
Services	14	73	11	2
Public Administration	11	66	21	2
All Industries	11	67	19	3

Note: These figures are not adjusted for seasonal variations.
*The size of the mining industry's responding sample does not permit a hiring trend forecast.



Alabama
Arkansas
Delaware
District of Columbia
Florida
Georgia
Kentucky
Louisiana
Maryland
Mississippi
North Carolina
Oklahoma
South Carolina
Tennessee
Texas
Virginia
West Virginia

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

Regionally, the South continues to offer the brightest future for jobseekers with a major upswing reported by the construction industry. In addition to the predicted expansion in workforce, employers in this sector expect fewer cutbacks than one year ago.

Manufacturers of both durable and non-durable goods continue to predict slow-paced hiring activity with both showing a weakened employment picture.

The highest number of job opportunities in the South are reported by the white-collar sectors of services and finance, insurance and real estate. Neither group posts survey figures which are an improvement over those recorded one year ago, but employment levels are expected to be stable.

Like the national trend, Southern wholesale and retail merchants predict slow-paced hiring activity, but the seasonal staff reductions are expected to be less severe than in previous first quarters.

Southern employers in the public administration sector are cautiously optimistic in their hiring plans with a high number planning no change in staff levels.

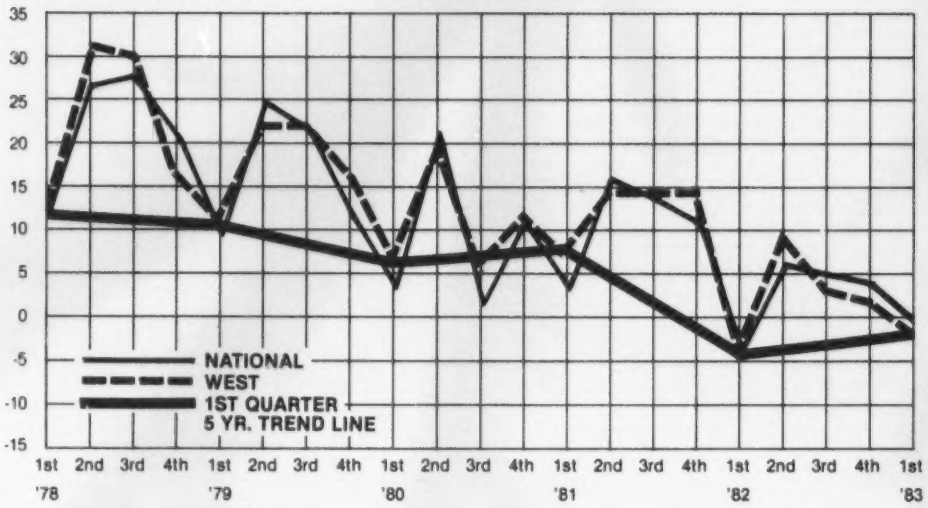
Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	11	75	11	3
Construction	24	55	15	6
Manufacturing—Durable Goods	14	68	15	3
Manufacturing—Non-durable Goods	12	74	11	3
Transportation & Public Utilities	17	71	10	2
Wholesale & Retail Trade	16	63	17	4
Finance, Insurance & Real Estate	21	69	8	2
Education—Public & Private	7	79	12	2
Services	21	69	8	2
Public Administration	13	73	9	5
All Industries	16	68	13	3

Note: These figures are not adjusted for seasonal variations.

West

Arizona
California
Colorado
Hawaii
Idaho
Montana
Nevada
New Mexico
Oregon
Utah
Washington
Wyoming

MEASURE OF HIRING EXPECTATIONS



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While Western employers continue to expect slightly more cutbacks than increases in staff levels, the construction industry and manufacturers of non-durable goods predict an improved job climate. A major upswing is predicted by construction employers planning to expand staff size while the number expecting reductions has dropped markedly. Likewise, cutbacks are expected to slow in the non-durable goods manufacturing sector and hiring is expected to be similar to that of one year ago.

Manufacturers of durable goods are not as optimistic with slightly more employers expecting cutbacks as plan staff increases. Last year at this time, the reverse was reported.

The first quarter 1983 employment outlook for the wholesale and retail trade sector is similar to that of last year with regional survey figures lagging behind those reported nationally.

Western service employers expect slow-paced hiring activity with slightly fewer job opportunities in the first quarter than offered one year ago. Both educators and public administrators report an improved job picture as fewer employers expect staff cutbacks than one year ago.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	25	62	13	0
Construction	16	62	21	1
Manufacturing—Durable Goods	17	60	21	2
Manufacturing—Non-durable Goods	16	76	6	2
Transportation & Public Utilities	14	63	22	1
Wholesale & Retail Trade	12	62	24	2
Finance, Insurance & Real Estate	22	66	9	3
Education—Public & Private	9	75	14	2
Services	16	71	11	2
Public Administration	10	75	13	2
All Industries	14	68	16	2

Note: These figures are not adjusted for seasonal variations.

MANPOWER®
TEMPORARY SERVICES
International Headquarters
5301 N. Ironwood Road, Milwaukee, WI 53217

The quarterly Employment Outlook Survey is conducted as a public service of Manpower, Inc. The survey was designed and is administered by Manpower's International Research Department, utilizing a statistically representative sample of more than 11,200 large public and private employers from among ten industrial sectors in 347 U.S. cities.

The first quarter 1983 survey is a measurement of employment plans for the permanent workforce and is based upon interviews conducted with the survey sample immediately prior to December 1, 1982.

The survey results reflect the intentions of the sample employers interviewed. Some of these intentions may change unexpectedly upon the conclusion of the survey.

B5275-1

EMPLOYMENT OUTLOOK SURVEY

First Quarter 1983
Manpower, Inc.

Summary of Results

The following table shows the percentage of 11,212 employers in 347 U.S. cities who plan to increase, decrease, or make no change in the size of their present workforce during the first quarter of 1983 (January, February, March), with comparisons for the first quarter of 1982:

	% Planning Increase		% Planning Decrease		% Planning No change		% Unsure	
	'83	'82	'83	'82	'83	'82	'83	'82
National	14	15	15	18	68	63	3	4
South	16	20	13	15	68	62	3	3
Northeast	12	14	15	16	68	66	5	4
West	14	15	16	19	68	61	2	5
Midwest	11	11	19	23	67	63	3	3

Overall: In all geographic regions of the U.S., staff reductions will not be as severe as those reported last year at this time. Increases in staff will be marginally lower.

South: More job opportunities than other regions. Although hiring activity will be slower than last year, there will also be a decline in layoffs.

Northeast: The Northeast shows the least change from the first quarter of 1982. Hiring activity is expected to be weak, but stable.

West: Predicted hiring activity in the West follows the national trend, with fewer staff reductions expected than last year at this time.

Midwest: Even though the Midwest reports the fewest number of job prospects, it shows the greatest improvement in its employment outlook compared to last year. The number of employers who plan staff increases has stabilized, while there has been a significant drop in the number of employers who plan staff decreases.

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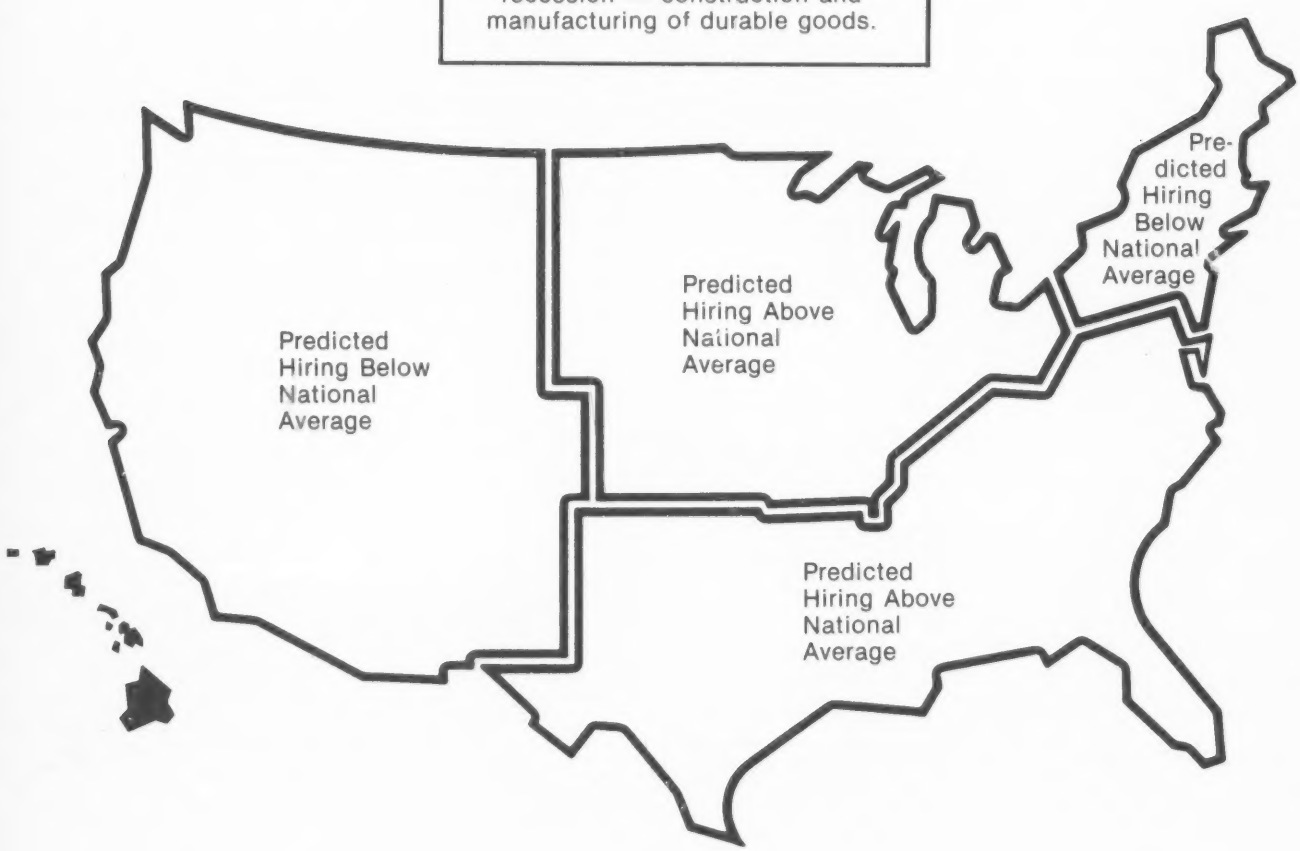
B5275-1
5/21/83

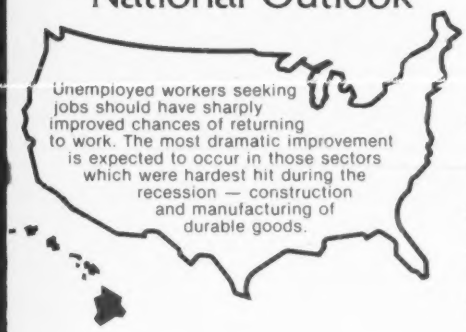
Manpower, Inc. Employment Outlook Survey

Second Quarter
April, May, June
1983

Unemployed workers seeking jobs should have sharply improved chances of returning to work. The most dramatic improvement is expected to occur in those sectors which were hardest hit during the recession — construction and manufacturing of durable goods.


Predicted Hiring Below National Average
Predicted Hiring Above National Average
Predicted Hiring Above National Average
Predicted Hiring Below National Average

National Outlook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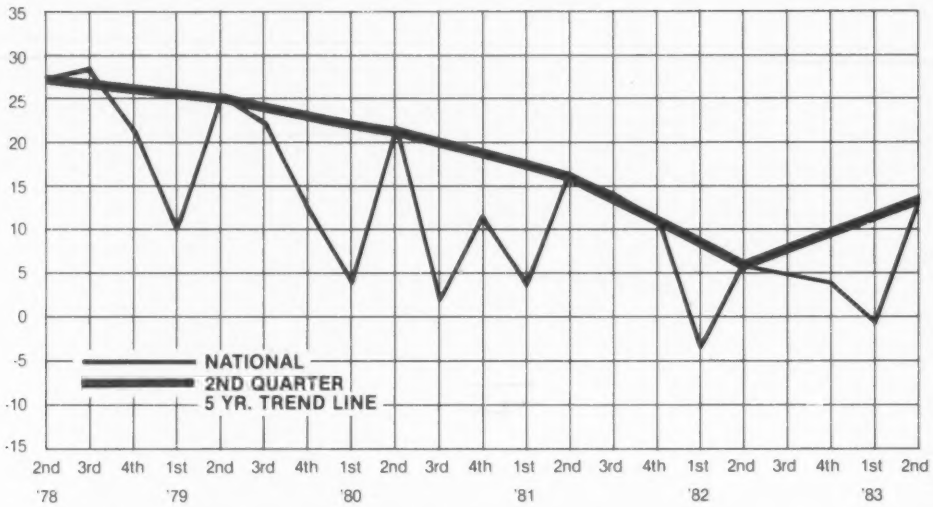
MEASURE OF HIRING EXPECTATIONS*



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*The Measure of Hiring Expectations is the difference between the percentage of employers predicting staff increases and those planning to decrease hiring activity.

Unemployed workers seeking jobs should have sharply improved chances of returning to work during the coming three months, according to the findings of the Employment Outlook Survey.

According to the quarterly poll of more than 11,175 employers in 348 U.S. cities, a significant number of firms plan to hire additional workers during the second quarter of 1983 (April, May, June), while the pace of staff reductions will diminish dramatically. Overall, the job outlook is vastly improved over last year at this time.

The most dramatic improvement in job opportunities is expected to occur in those sectors which were hardest hit during the recession — construction and manufacturing of durable goods. Jobseekers in the troubled Midwest are likely to find a much improved job climate with survey figures the best reported for that region of any quarter during the past three years.

Major improvements are also visible in the finance, insurance and real estate sector and in wholesale and retail trade. Also improved, but to a lesser degree than the former groups, are manufacturing of non-durable goods, the transportation and public utilities sector and education. Only the services sector, which suffered least from recessionary layoffs, shows no increase in employment levels from those reported one year ago.

Geographic regions, like economic sectors, are expected to show the sharpest improvement where the recession hit hardest. The Midwest reports the largest gain in employment opportunities; Southern jobseekers are likely to find an improved job climate, but considerably less dramatic than that in the Midwest.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	10	80	8	2
Construction	34	53	10	3
Manufacturing—Durable Goods	24	65	9	2
Manufacturing—Non-durable Goods	20	69	8	3
Transportation & Public Utilities	17	70	10	3
Wholesale & Retail Trade	23	69	6	2
Finance, Insurance & Real Estate	21	71	6	2
Education—Public & Private	9	77	13	1
Services	23	69	6	2
Public Administration	15	69	12	4
All Industries	21	69	8	2

Note: These figures are not adjusted for seasonal variations.

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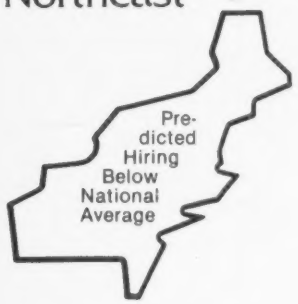
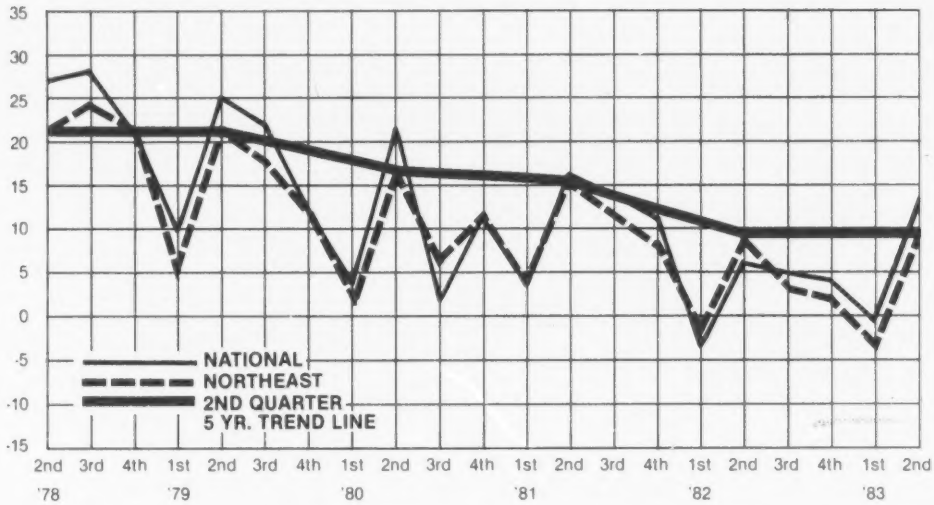
Northeast



Connecticut
Maine
Massachusetts
New Hampshire
New Jersey
New York
Pennsylvania
Rhode Island
Vermont

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

Employers in the Northeast expect some upward movement in key employment sectors, but the overall job outlook has not changed significantly from that of one year ago. Slightly fewer firms predict staff cutbacks, but fewer also plan to expand staff size.

The employment outlook has improved slightly in two key sectors — construction and manufacturing of durable goods. Far fewer construction firms anticipate layoffs this quarter than last year at this time, and employment levels are expected to be higher than any time in the past seven quarters. Also encouraging are reports by manufacturers of durable goods who expect fewer cutbacks; employment levels are expected to be the highest since the second quarter of 1981.

Hiring expectations by wholesale and retail merchants have improved with staff size expected to be near the seasonal high level of the fourth quarter of 1982. Current figures are the best recorded for any second quarter since 1979.

A slight increase in hiring is also reported by the finance, insurance and real estate sector. While the number of firms expecting cutbacks has not dropped, employment levels are reported to be the highest of any second quarter since 1980.

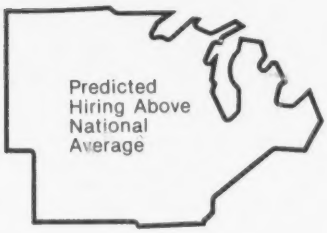
Public administrators report a slightly improved employment outlook although slightly more agencies continue to reduce rather than add staff.

Service employers predict a decline in hiring with fewer expecting to increase staff size, but no additional firms predict cutbacks.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining*				
Construction	26	63	5	6
Manufacturing—Durable Goods	21	69	9	1
Manufacturing—Non-durable Goods	15	74	7	4
Transportation & Public Utilities	18	66	9	7
Wholesale & Retail Trade	21	68	6	5
Finance, Insurance & Real Estate	15	72	6	7
Education—Public & Private	7	78	13	2
Services	17	72	7	4
Public Administration	11	66	16	7
All Industries	17	71	8	4

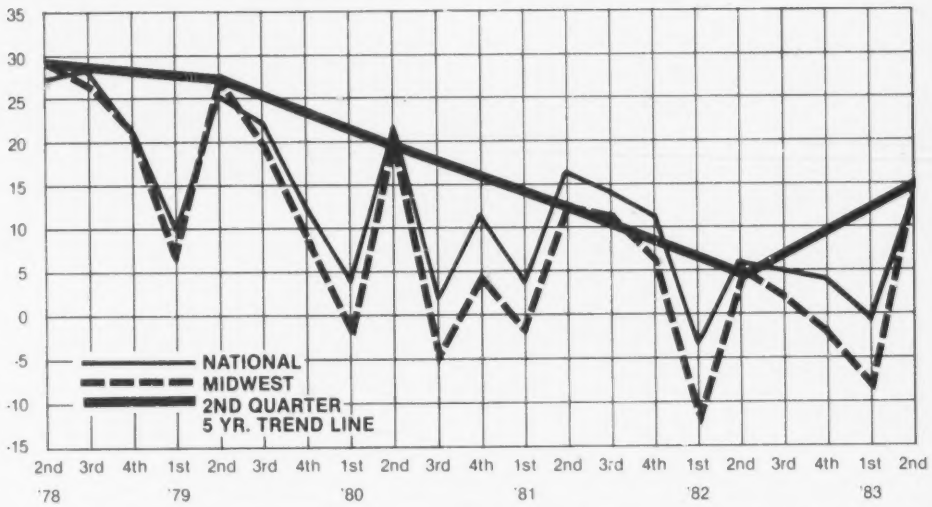
Note: These figures are not adjusted for seasonal variations.
*The size of the mining industry's responding sample does not permit a hiring trend forecast.

Midwest



Illinois	Missouri
Indiana	Nebraska
Iowa	North Dakota
Kansas	Ohio
Michigan	South Dakota
Minnesota	Wisconsin

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

The most significant improvement in the employment outlook is reported by the Midwest. Far fewer employers expect cutbacks and more plan to hire additional workers than one year ago. More importantly, the hiring is planned by key sectors — manufacturing and construction.

A seasonal increase in construction hiring is predicted with employment levels expected to be the highest for any quarter since second quarter 1980.

The improvement in employment levels is even more dramatic in the manufacturing sectors. Many more manufacturers of durable goods plan to add staff during the next three months and far fewer anticipate cutbacks than one year ago. Again, employment levels are predicted at their highest for any quarter since the second quarter of 1980. A similarly improved situation is reported by manufacturers of non-durable goods with employment levels again expected to be the best since second quarter of 1980.

Wholesale and retail merchants predict the highest number of job opportunities for second quarters since 1980.

The services sector reports increased hiring and fewer cutbacks with employment levels predicted to be the highest since third quarter 1981.

The finance, insurance and real estate sector predicts a slight increase in hiring and fewer cutbacks with employment levels reported to be the highest since second quarter 1981.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining*				
Construction	34	50	13	3
Manufacturing—Durable Goods	24	64	9	3
Manufacturing—Non-durable Goods	23	66	10	1
Transportation & Public Utilities	12	75	12	1
Wholesale & Retail Trade	23	69	6	2
Finance, Insurance & Real Estate	16	77	6	1
Education—Public & Private	9	78	12	1
Services	26	67	6	1
Public Administration	16	70	11	3
All Industries	23	67	8	2

Note: These figures are not adjusted for seasonal variations.

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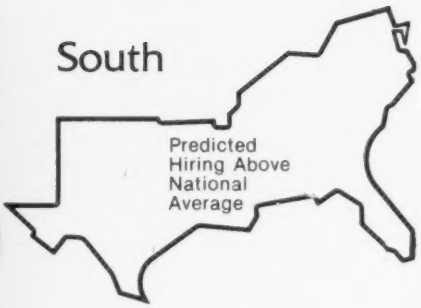
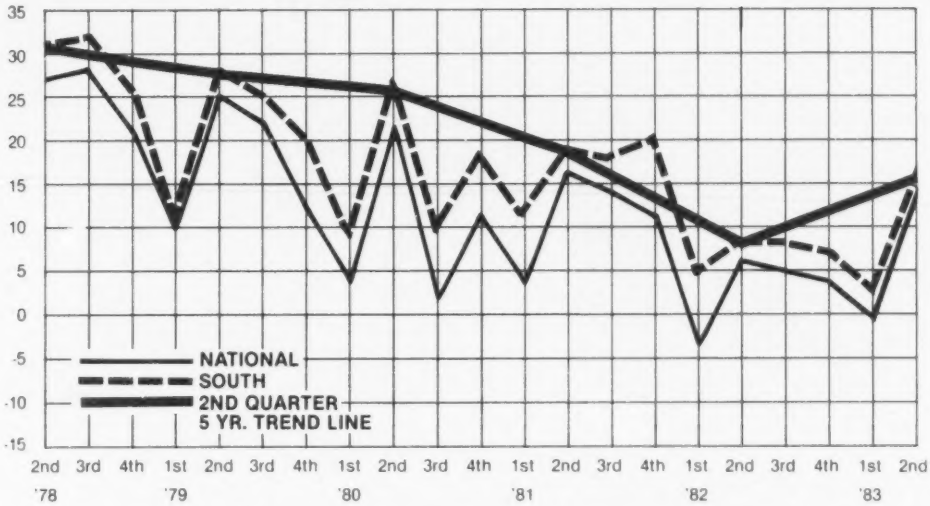


Alabama
Arkansas
Delaware
District of Columbia
Florida
Georgia
Kentucky
Louisiana
Maryland
Mississippi
North Carolina
Oklahoma
South Carolina
Tennessee
Texas
Virginia
West Virginia

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

Southern employers continue to report the highest number of job opportunities of any geographical region, and employment levels are expected to be the highest since the fourth quarter of 1981.

Improved hiring activity is expected by many employment sectors in the South — by construction firms, by manufacturers of both durable and non-durable goods, by transportation and public utilities, by wholesale and retail merchants, by the finance, insurance and real estate sector, by public administrators and, to a lesser degree, by the services industry.

Seasonal hiring increases are predicted by construction employers at levels which are the highest since third quarter 1979.

Far fewer manufacturers of durable goods anticipate cutbacks than one year ago and employment levels are expected to be the best since fourth quarter 1981. A similarly bright outlook is reported by manufacturers of non-durable goods.

Far fewer cutbacks are also predicted by the transportation and public utilities sector with employment levels the highest since fourth quarter 1981.

Wholesale and retail merchants report employment levels to be near the seasonal high reported in the fourth quarter of 1982.

A very high increase in the number of job opportunities is predicted by the finance, insurance and real estate sector with employment levels expected to be the highest since third quarter 1979.

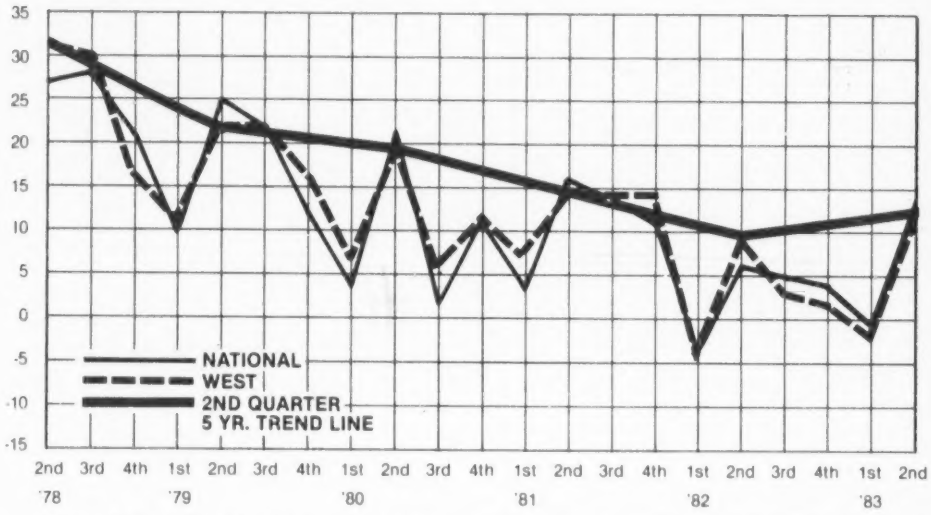
Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	6	89	5	0
Construction	40	50	7	3
Manufacturing—Durable Goods	25	64	8	3
Manufacturing—Non-durable Goods	21	69	7	3
Transportation & Public Utilities	18	72	8	2
Wholesale & Retail Trade	24	69	5	2
Finance, Insurance & Real Estate	29	68	2	1
Education—Public & Private	7	84	8	1
Services	24	69	5	2
Public Administration	17	70	11	2
All Industries	23	68	7	2

Note: These figures are not adjusted for seasonal variations.

West

Arizona
California
Colorado
Hawaii
Idaho
Montana
Nevada
New Mexico
Oregon
Utah
Washington
Wyoming

MEASURE OF HIRING EXPECTATIONS



Note: The annual trend line represents net employment expectations for the current quarter in relation to the same periods of previous years. These figures do not account for seasonal variations.

Western employers predict a slight improvement in the job outlook for the second quarter of 1983 with slightly fewer firms expecting staff reductions than last year at this time.

Overall, employment levels are expected to be at their highest since fourth quarter 1981. Nearly every employment sector in the West has improved with gains in the finance, insurance and real estate sector the most dramatic. While employment levels are expected to be about the same as those reported last quarter by firms in that sector, the level is the best recorded for any quarter since the first quarter of 1981. Substantial gains are also reported by public administrators who anticipate employment levels to be the highest since first quarter 1981.

Manufacturers of non-durable goods predict increased hiring and fewer reductions with employment levels expected to be the highest since fourth quarter 1981. Manufacturers of durable goods, however, are not as optimistic and hiring is expected to be about the same as last year at this time.

Job opportunities will improve for the wholesale and retail sector with employment levels expected to be the highest since fourth quarter 1981.

The transportation and public utilities sector is similarly optimistic with employment levels expected to also be the highest since fourth quarter 1981.

Industry Category	Increase %	No Change %	Decrease %	Don't Know %
Mining	14	72	14	0
Construction	33	46	20	1
Manufacturing—Durable Goods	29	56	14	1
Manufacturing—Non-durable Goods	21	71	8	0
Transportation & Public Utilities	20	69	11	0
Wholesale & Retail Trade	24	66	9	1
Finance, Insurance & Real Estate	22	68	9	1
Education—Public & Private	11	63	26	0
Services	23	69	6	2
Public Administration	14	70	12	4
All Industries	23	65	11	1

Note: These figures are not adjusted for seasonal variations.

MANPOWER
TEMPORARY SERVICES
International Headquarters
5301 N. Ironwood Road, Milwaukee, WI 53217

The quarterly Employment Outlook Survey is conducted as a public service of Manpower, Inc. The survey was designed and is administered by Manpower's International Research Department, utilizing a statistically representative sample of more than 11,175 large public and private employers from among ten industrial sectors in 348 U.S. cities.

The second quarter 1983 survey is a measurement of employment plans for the permanent workforce and is based upon interviews conducted with the survey sample immediately prior to March 1, 1983.

The survey results reflect the intentions of the sample employers interviewed. Some of these intentions may change unexpectedly upon the conclusion of the survey.

EMPLOYMENT OUTLOOK SURVEY

Second Quarter 1983
Manpower, Inc.

SUMMARY OF RESULTS

The following table shows the percentage of 11,177 employers in 348 U.S. cities who plan to increase, decrease, or make no change in the size of their present workforce during the second quarter of 1983 (April, May, June), with comparisons for the second quarter of 1982:

	% Planning Increase		% Planning Decrease		% Planning No Change		% Unsure	
	'83	'82	'83	'82	'83	'82	'83	'82
National	21	19	8	13	69	65	2	3
South	23	20	7	12	68	65	2	3
Midwest	23	18	8	14	67	65	2	3
West	23	22	11	13	65	62	1	3
Northeast	17	18	8	9	71	69	4	4

Overall — For the first time since 1981, employers nationwide predict a significant improvement in employment levels for the next three months. Staff reductions are sharply lower and the trend in hiring has turned up.

South — An improved job climate, but not as dramatic an improvement as in the Midwest. Construction, wholesale and retail trade and the finance, insurance and real estate sectors are particularly strong.

Midwest — Dramatic improvement with survey figures the best reported for this region of any quarter during the past three years. Manufacturing sectors report largest gain in job prospects.

West — An expected upward movement based on seasonal factors, but the upswing is no greater than that reported last year at this time.

Northeast — Few gains although some reported by manufacturers of durable goods and the wholesale and retail trade.